



C o u n t y o f S a n L u i s O b i s p o

General Services Agency

Janette D. Pell, General Services Agency Director

Helen McCann, Department Administrator

REQUEST FOR PROPOSAL PS- # 1024 TRAINING AND CONSULTING SERVICES

April 22, 2009

The County of San Luis Obispo is currently soliciting proposals for professional services for Training and Consulting Services.

Each proposal shall specify each and every item as set forth in the attached specifications. Any and all exceptions must be clearly stated in the proposal. Failure to set forth any item in the specifications without taking exception, may be grounds for rejection. The County of San Luis Obispo reserves the right to reject all proposals and to waive any informalities.

If your firm is interested and qualified, please submit six (6) copies of your proposal by 3:00 p.m. on May 22, 2009 to:

County of San Luis Obispo
Phill Haley, GSA - Purchasing
1087 Santa Rosa Street
San Luis Obispo, CA 93408

If you have any questions about the proposal process, please contact me. For technical questions and information contact Helen McCann at (805) 781-5200.

PHILL HALEY
Buyer - GSA - Purchasing
phaley@co.slo.ca.us

TO: ALL PROSPECTIVE PROPOSERS
SUBJECT: LOCAL PROPOSERS PREFERENCE

The County of San Luis Obispo has established a local vendor preference. All informal and formal Request for Proposals for contracts will be evaluated with a 5% preference for local vendors. Note the following exceptions:

1. Those contracts which State Law or, other law or regulation precludes this local preference.
2. Public works construction projects.

A "local" vendor will be approved as such when, 1) It conducts business in an office with a physical location within the County of San Luis Obispo; 2) It holds a valid business license issued by the County or a city within the County; and 3) Business has been conducted in such a manner for not less than six (6) months prior to being able to receive the preference.

As of March 3, 1994 individual County Buyers evaluate RFP's (Request For Proposals) considering the local vendor preference described above. The burden of proof will lie with proposers relative to verification of "local" vendor preference. Should any questions arise, please contact a buyer at (805) 781-5200. All prospective proposers are encouraged to quote the lowest prices at which you can furnish the items or services listed in County proposals.

	YES	NO
Do you claim local vendor preference?		
Do you conduct business in an office with a physical location within the County of San Luis Obispo?		
Business Address: _____		
Years at this Address: _____		
Does your business hold a valid business license issued by the County or a City within the County?		
Name of Local Agency which issued license: _____		

Business Name: _____

Authorized Individual: _____ Title: _____

Signature: _____ Dated: _____

PROPOSAL SUBMITTAL AND SELECTION

1. All proposals, consisting of six (6) copies must be received by mail, recognized carrier, or hand delivered no later than 3:00 p.m. on May 22, 2009. **Late proposals will not be considered.**
2. All correspondence should be directed to:

San Luis Obispo County
General Services Agency - Purchasing
1087 Santa Rosa Street
San Luis Obispo, CA 93408
ATTENTION: Phill Haley
Telephone: 805-781-5904
3. Costs of preparation of proposals will be borne by the proposer.
4. It is preferred that all proposals be submitted on recycled paper, printed on two sides.
5. Selection of qualified proposers will be by an approved County procedure for awarding professional contracts.
6. This request does not constitute an offer of employment or to contract for services.
7. The County reserves the option to reject any or all proposals, wholly or in part, received by reason of this request.
8. The County reserves the option to retain all proposals, whether selected or rejected.
9. All proposals shall remain firm for sixty, (60) days following closing date for receipt of proposals.
10. The County reserves the right to award the contract to the firm who presents the proposal which in the judgment of the County, best accomplishes the desired results, and shall include, but not be limited to a consideration of the professional service fee.
11. Selection will be made on the basis of the proposals as submitted. The Selection Committee may deem it necessary to interview applicants. The County retains the right to interview applicants as part of the selection process.
12. The proceedings of the Selection Committee are confidential. Members of the Selection Committee are not to be contacted by the proposers.

PROPOSAL FORMAT

A qualifying proposal must address all of the following points:

1. Project Title
2. Applicant or Firm Name
3. Firm Qualifications
 - a. Type of organization, size, professional registration and affiliations.
 - b. Names and qualifications of personnel to be assigned to this project.
 - c. Outline of recent projects completed that are directly related to this project. Consultant is required to demonstrate specific design and project expertise relating to the requirements of the Project Scope.
 - d. Qualifications of consultants, subcontractors, or joint venture firm, if appropriate.
 - e. Client references from recent related projects, including name, address and phone number of individual to contact for referral.
4. Understanding of and Approach to the Project
 - a. Summary of approach to be taken.
 - b. Description of the organization and staffing to be used for the project.
 - c. Indication of information and participation the proposer will require from County staff.
 - d. Indication of time frame necessary to complete the plan review once a Notice to Proceed is issued.
5. Fees and Insurance
 - a. Propose total fixed fees to complete project as described under Project Scope.
 - b. The selected Consultant will be required to provide insurance coverage in the amount of \$500,000.00 General Liability Insurance and \$500,000.00 of Professional Liability Insurance. This amount of insurance coverage shall be reflected in your estimated professional fee.
 - c. The Consultant shall provide within five (5) days after the Notice of Award is issued a certificate of liability insurance naming the County of San Luis Obispo and its employees and officers as additionally named insured. This shall be maintained in full force and effect for the duration of the contract and must be in an amount and format satisfactory to the County.

d. Indemnification

Consultant shall defend, indemnify and hold harmless the County, its officers and employees from all claims, demands, damages, costs, expenses, judgments, attorney fees, liabilities or other losses that may be asserted by any person or entity, and that arise out of or are made in connection with the acts or omissions relating to the performance of any duty, obligation, or work hereunder. The obligation to indemnify shall be effective and shall extend to all such claims and losses, in their entirety, even when such claims or losses arise from the comparative negligence of the County, its officers and employees. However, this indemnity will not extend to any claims or losses arising out of the sole negligence or willful misconduct of the County, its officers and employees.

The preceding paragraph applies to any theory of recovery relating to said act or omission, by the Consultant, or its agents, employees, or other independent contractors directly responsible to Consultant including, but not limited to the following:

1. Violation of statute, ordinance, or regulation.
2. Professional malpractice.
3. Willful, intentional or other wrongful acts, or failures to act.
4. Negligence or recklessness.
5. Furnishing of defective or dangerous products.
6. Premises liability.
7. Strict Liability.
8. Violation of civil rights.
9. Violation of any federal or state statute, regulation, or ruling resulting in a determination by the Internal Revenue Service, California Franchise Tax Board or any other California public entity responsible for collecting payroll taxes, when the Consultant is not an independent contractor.

It is the intent of the parties to provide the County the fullest indemnification, defense, and "hold harmless" rights allowed under the law. If any word(s) contained herein are deemed by a court to be in contravention of applicable law, said word(s) shall be severed from this contract and the remaining language shall be given full force and effect.

GSA Organizational Health Project

1. Project Description

Provide consulting services to management and training for employees designed to support the transition of the County departments to the General Services Agency. Evaluate the strengths and weaknesses of the organization and individual managers. Provide reports and recommendations to management. Design and deliver team training and individual counseling for employees. The training and counseling will be customized to support the employee's individual learning and growth, as well as to support the goals of the organization and the County.

2. Description of Services and Scope of Work

Vendor will be required to:

- a. Meet with managers and teams to assess current organizational challenges
- b. Consult with managers on organizational challenges and options for responses to the challenges, including options for structural changes or individual assignment changes to better serve the overall health and efficiency of the GSA. Provide reports and recommendations to management.
- c. Provide counseling and guidance regarding organizational design
- d. Provide counseling and training on business process improvement
- e. Provide ombudsman services (neutral listener) for managers and staff
- f. Design and administer targeted organizational assessments and surveys
- g. Design and assist in the preparation and analysis of customer satisfaction surveys
- h. Provide customized counseling for individual leadership team members
- i. Provide teambuilding exercises and customized training for GSA teams
- j. Provide coaching for staff members involved in sensitive personnel matters
- k. Provide training that directly involves the GSA and SLO County goals and core values as applied to the day to day delivery of customer service, including, but not limited to:
 - i. Leadership Training
 - ii. Supervisor Basics
 - iii. Customer Service
 - iv. Dealing with Difficult People
 - v. Dealing with Conflict in the Workplace
 - vi. 360° Evaluations for managers
 - vii. Preparing and administering Performance Evaluations

The activities described above shall total up to 480 hours per fiscal year as assigned by the Director. The GSA is not interested in "off the shelf" packaged training applicable to any organization, but rather a customized set of practical targeted consultations and activities customized for the GSA.

3. Description of the Qualifications of the Vendor

- a. Experience and expertise with organizational health assessments
- b. Knowledge and experience working with County government.
- c. Experience and expertise in:
 - i. working with governmental agencies in transition
 - ii. customer service organizations
 - iii. change resistant organizations

The vendor will commit one experienced senior individual as the sole service provider for the GSA. Consistency and relationship-building are essential to the success of the project.

4. Costs

The proposal must detail the cost of services by cost per hour for time actually spent on site at the offices of the County of San Luis Obispo. The GSA requires the flexibility to set up the schedule of activities and/or training sessions with as little as 30 days notice to the vendor. The subject and duration of the activities shall be at the direction of the GSA Director in consultation with the vendor. Therefore, telephone consultations and pre-site visit planning sessions should not be charged by the hour, but be part of the service.

Reasonable expenses for the estimated 480 hours as 60 days of on site service delivery are to be calculated and included in the proposal. All expenses must be consistent with the County of San Luis Obispo Travel and Reimbursement policies, which can be made available at your request. Guidelines to these policies are included in Attachment A.

ATTACHMENT A

GUIDELINE TO MILEAGE REIMBURSEMENT RATES

The County follows the IRS reimbursement rates for mileage. The mileage reimbursement rate effective January 1, 2009 is \$.550 per mile.

GUIDELINES TO MEAL AND HOTEL/MOTEL RATES

The following travel reimbursement rates are effective as of February 6, 2007, for all individuals traveling under the County Travel Policy. These rates shall remain in effect until modified by the Board of Supervisors. Under special circumstances, the guideline rates may be exceeded by up to 50% upon approval of the Auditor-Controller. Department heads must submit prior written justification for lodging expenses to the Auditor-Controller supporting their request for an exemption to these rates.

MEALS

Meals must be claimed at the actual amount spent up to the maximum allowable amounts as follows:

Breakfast	\$12.00
Lunch	\$15.00
Dinner	\$27.00

The County is not on a per diem system, but rather reimburses for each meal on an individual basis according to the following time criteria:

<u>Meal</u>	<u>Travel must begin before</u>	<u>or</u>	<u>end after</u>
Breakfast	7:00 a.m.		8:00 a.m.
Lunch	11:00 a.m.		1:00 p.m.
Dinner	5:00 p.m.		6:00 p.m.

HOTEL/MOTEL RATES

The maximum room rates allowed for an individual on official County business as described in the Travel Policy are as follows:

- a. Single room rate - \$150.00 plus tax and parking.
- b. Double or multiple room rates - \$200.00 plus tax and parking. This rate is applicable only when all individuals sharing the room are authorized personnel eligible for reimbursement.
- c. High Cost Area -\$190.00 ** (Single occupancy) plus tax and parking.

**High cost areas:

(1) For hotels in the San Francisco Bay area, greater San Diego area, downtown Los Angeles, coastal areas of Los Angeles, Monterey, and Orange County

(2) In order to save time and local transportation and parking costs, this rate may also be appropriate for employees staying at conference host hotels.

Employees shall seek, and shall be reimbursed for, accommodations that are of good quality and in reasonable proximity to the place where the employee is to conduct County business. Reimbursement will not be made for luxury accommodations.

LODGING HIGH COST AREAS

<u>AREA/CITY</u>	<u>INCLUDES THESE CITIES</u>	<u>SPECIFIC DATES</u>
Alameda County	Oakland, San Leandro, Berkeley	
Contra Costa County	Concord, Martinez, Richmond	
LA Coastal	Malibu, Santa Monica, Redondo Beach, Manhattan Beach, Palos Verdes area	
LA Downtown	Wilshire Blvd, Santa Monica Blvd area	
Marin County	San Rafael, Sausalito, Novato	
Napa County	Napa, Calistoga	
Monterey Coastal Carmel	Carmel Valley, Monterey	May-October
Orange County Coastal	Long Beach, Huntington Beach, Laguna Beach, Newport Beach, Costa Mesa, Dana Point, San Clemente	
Palm Springs		January-May
San Diego Co. Coastal	San Diego, Coronado, La Jolla, Carlsbad, Oceanside, Encinitas	
San Francisco Bay	San Francisco, Half Moon Bay, San Mateo, Redwood City	
Santa Barbara		
Santa Clara Area	Palo Alto, Mountain View, Sunnyvale, San Jose Los Altos, Menlo Park	
Santa Cruz		
South Lake Tahoe		June-August
Yosemite	Fish Camp	May-Sept

Areas Outside California

Boston, Cambridge
 Chicago
 Jackson Hole, WY
 New York City
 Philadelphia
 Seattle
 Washington DC, Alexandria, VA
 Prince George, MD